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# iSearch COVID-19 Portfolio User Guide

18th Mar 2021

In response to analytical needs in connection with the SARS CoV 2 pandemic (COVID-19), the NIH Office of Portfolio Analysis (OPA) has developed a comprehensive, expert-curated portfolio of COVID-19 publications and preprints. Our *iSearch* COVID-19 portfolio, which includes peer-reviewed articles from PubMed and preprints from arXiv, bioRxiv, ChemRxiv, medRxiv, Preprints.org, Qeios, Research Square, and SSRN. The portfolio is updated daily with the latest available data. This resource enables users to explore and analyze the rapidly growing set of advances in either COVID-19 or the novel coronavirus SARS-CoV-2 research as they accumulate in real time, and complements efforts by NLM to aggregate full text documents broadly related to COVID-19, the novel coronavirus SARS-CoV-2, or other outbreaks, and articles on COVID-19 or SARS-CoV-2 specific to the PubMed database.

□

# Quick Start

2nd Oct 2020

The links below provide quick access to the most common pages in the *iSearch* COVID-19 Portfolio User Guide. You can refer to these links quickly or use the table of contents along the left side of the screen. For video tutorials [click here](#).

[Table View](#)

[Facet View](#)

[Search Bar and Buttons](#)

[Searchable Fields](#)

[Advanced Searching](#)

[Export and Visualize](#)

[Options Menu](#)

# Data Sources

18th Mar 2021

## Sources:

Peer reviewed PubMed articles

Preprints from arXiv, bioRxiv, ChemRxiv, medRxiv, Preprints.org, Qeios, Research Square, and SSRN

## Update Frequency

All sources are updated daily. New data is retrieved nightly, processed, and made available by approximately 9am EST.

# Search Bar and Buttons

22nd Apr 2020

Next to the search bar is a series of buttons that provide you with more control over your search.

[AND/OR](#)

[Search Button](#)

[Searchable Fields](#)

[Reset Search](#)

[Advanced Filters](#)

□

# AND/OR

15th Apr 2020

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Located to the right of the search bar are two radio buttons for the search operators AND and OR. By default, the *iSearch* COVID-19 Portfolio uses the AND search operator between all search terms and phrases. AND requires all terms and phrases to occur in each record returned. Records that mention one of the search terms or phrases but not the other(s) will be excluded from the results.

Conversely, OR will return results where one, some, or all of the search terms or phrases occur in each record. Use the OR operator when it is not necessary for all terms or phrases to occur in each of the resulting records.

Some fields, like PMIDs, are unique to each record. When using a list of unique identifiers in a search be sure to switch the search operator to OR to return the appropriate results. If you execute a query and return zero results, check your query syntax and search operator and review the [Advanced Search](#) section for query syntax rules and suggestions.

When you use a boolean operator (AND or OR) within your query syntax, the boolean operator in the query overrides the selected search operator to the right of the search bar. For example, if your query contains an OR boolean operator between the search terms or phrases and the AND operator is selected to the right of the toolbar, the OR in the query syntax is the operator used to conduct the search.

If you switch the search operator used to conduct your search after your initial search be sure to click the Search button to rerun the search with the newly selected search operator.

# Search Button

15th Apr 2020

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Depicted as a magnifying glass, click the Search button to execute a search.

## Empty Searches

Empty searches are a valid way to begin the query process before focusing results by applying filters and facets. However, it should be noted that when executing an empty search, the results returned will vary depending on the search fields selected in the [Searchable Fields](#) dialog. When an empty search is performed, behind the scenes, the *iSearch* COVID-19 Portfolio search engine is performing a [Wildcard](#) search in the selected search fields and the results returned will contain all records that have a value in the field(s) selected. Therefore, even a simple empty search will return varying results depending on the search fields selected. To learn more about search fields read the [Searchable Fields](#) section. To learn more about query syntax and how the *iSearch* COVID-19 Portfolio search engine works read the [Advanced Search](#) section.



# Searchable Fields

13th Apr 2020

□

Represented as a down arrow, Searchable Fields allows you to select which fields are searched in your query. It should be emphasized that searches are only executed within the selected search fields.

□

Select the checkbox to the left of the fields to be queried. To search all fields within a group, select the checkbox next to the group heading, and the entire group of fields will be searched. To find a field quickly, type the field name into the Lookup Search Fields search bar. Additionally, you can use the Select All/Deselect All buttons to make field selection quicker and easier. Click the Reset button to reset the search field selections. Once you have selected all applicable search fields, click the “x” in the top right corner, then click Search or press Enter to execute your search.

# Reset Search

14th Apr 2020

The “x” to the right of the Search bar resets the current search. By clicking Reset Search, the query and any changes to Searchable Fields, Advanced Filters, and facets will be reset to the application's default settings. You are then returned to the application’s landing page where a new query can be entered.

□

# Advanced Filters

15th Apr 2020

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Depicted as a funnel, Advanced Filters allows you to focus your query results further by entering specific criteria to search. The *iSearch* COVID-19 Portfolio Advanced Filters contain a combination of input text boxes for ranges and drop down lists. After you enter your search criteria, click the Apply Filters button to apply your selections and execute your search.

□

# Advanced Search

22nd Apr 2020

Use this section of the User Guide to learn more about advanced search techniques and search syntax and how to choose the best approach for each query. Choosing the right technique is about understanding your goals.

If your goal is to have higher record recall, then searching *lung cancer* may be the right technique. If your goal is to have more precise results, then searching "*lung cancer*" may be the right technique. Or maybe finding a middle ground is the best approach, in which case, searching "*lung cancer*"~4 may be the right technique.

There is no one-technique-fits-all-searches, and this section will help you assess your goals and find the approach that's best for your search.

Available search methods in the *iSearch* COVID-19 Portfolio are:

[Search terms and phrases](#)

[Boolean search](#)

[Minimum should match search](#) (find multiple matches in a list of terms)

[Wildcard search](#)

[Proximity search](#) (find words close to each other)

[Fuzzy search](#)

It is possible to create complex searches using the *iSearch* COVID-19 portfolio field names listed on the [Fields](#) page of the user guide.

# Searchable Fields

12th Nov 2020

## Custom Fields

To search specific fields, use the syntax `fieldname:query`. A list of all search fields can be found below.

To search for multiple terms within a field use the following syntax:

pmid:(32276773 31996437 31996345)

To search multiple years or a range of values use the following syntax (or use an asterisk for an open ended search):

pubDate:[2020-01-01 TO 2020-01-31]

Field Name	Description	Example Values
abstract	Abstract	abstract:"therapeutic intervention"
authors.affiliationNormalizedPreferred	Author affiliation	authors.affiliationNormalizedPreferred:"Central University"
apt	APT Score	apt:0.05
authorCount	Author Count	authorCount:2
authors.fullName	Authors	authors.fullName:"Angeletti, Silvia"
authors.firstName	Authors First Name	authors.firstName:"Robert"
authors.initials	Authors Initials	authors.initials:"MT"
authors.lastName	Authors Last Name	authors.lastName:"Taylor"
chemicalsDrugsPreferred	Chemicals & Drugs	chemicalsDrugsPreferred:Chloroquine
citingClinicalPmids	Citing Clinical PMIDs	citingClinicalPmids:32580948
conditionPreferred	Condition	conditionPreferred:pneumonia
devicesPreferred	Devices	devicesPreferred:"nasal swabs"
doi	DOI	doi:"10.1080/22221751.2020.1743767"
firstAuthor.fullName	First Author	firstAuthor.fullName:"Benvenuto, Domenico"
authors.affiliations	Full Author Affiliation	authors.affiliations:"University of Washington"
fulltext	Full Text	fulltext:"snake"
issn	ISSN	issn:"1073-449X"

Field Name	Description	Example Values
journalCountry	Country	journalCountry:"United States"
journalIssue	Journal Issue	journalIssue:1
journalNameIso	Journal Name ISO	journalNameIso:"Int J Environ Res Public Health"
journalName	Journal Name Full	journalName:Nature
journalPages	Journal Pages	journalPages:343
journalVolume	Journal Volume	journalVolume:17
lastAuthor.fullName	Last Author	lastAuthor.fullName:"Rapezzi, C"
latestVersion	Latest Version	latestVersion:"Yes"
licenseType	License Type	licenseType:"International Licence"
pmcid	PMCID	pmcid:PMC7141628
pmid	PMID	pmid:32207377
pubYear	Publication Year	pubYear:2019
pubDate	Publication Date	pubDate:[2020-01-01 TO 2020-01-31]
pubTypes	Publication Types	pubTypes:"Journal Article"
publishedAs	Published As	publishedAs:"10.1101/2020.02.22.20024927"
recordSource	Source	recordSource:medRxiv
supplementalText	Supplemental Text	supplementalText:"Wuhan"
id	System ID	id:32167153
targetPreferred	Target	targetPreferred:ACE2
title	Title	title:"Cross-reaction of sera from COVID-19 patients with SARS-CoV assays"
citedByPmidCount	Total Citations	citedByPmidCount:[5 TO 20]
citationCount	Total References	citationCount:[3 TO 10]

# Field Glossary

12th Nov 2020

**Abstract:** The publication abstract describes the content of the publication.

**APT Score:** Approximate Potential to Translate (APT) score identifying early signatures of bench-to-bedside translation, calculated using machine learning. For more information about the iCite Translation module methodology, see iCite help text: [https://icite.od.nih.gov/user\\_guide?page\\_id=ug\\_trans](https://icite.od.nih.gov/user_guide?page_id=ug_trans)

**Author Affiliation:** Name of the institution or other organisation for each author. Affiliation may be included for authors, corporate authors and investigators, if submitted by the publisher. The Abstract format displays affiliation for citations with fewer than 100 authors. PubMed includes the note "Contributed equally" in the affiliation field if this information is supplied by publishers. Each affiliation is within square brackets, multiple affiliations are separated by a semi-colon. See also Full Author Affiliation.

Example Value: Erasmus Medical Center

**Author Count:** Number of authors on the publication.

**Authors:** Search for publications by author name. This field contains the full name (on the publication) of all authors. Note that corporate authors will not appear in the author name list. This will explain inconsistencies between the author count and author names. To identify corporate authors you can use the 'Go to source' button in record view.

**Authors First Name:** Search by author first name. This field contains the first name (on the publication) of all authors. If the first name is an initial on the publication only the initial will appear in this field.

**Authors Initials:** Search by author initials. This field contains the initials of all authors listed on a publication. Authors are separated by a semi-colon ';'. Where an author has a middle initial there is no space between the first and middle initial.

**Authors Last Name:** Search by author last name. This field contains the last name (on the publication) of all authors. This field will reduce false positives if searching using just a last name, e.g. searching Thomas in author name would return any authors with a first, middle or last name of Thomas. Searching this field would only return last names.

**Chemicals and Drugs:** Publication title and abstract text are compared to a dictionary of chemical and drug terms and phrases. Returned matches are listed in this field. Can be searched as chemicalsDrugsPreferred or chemicalsDrugsBroadSynonym, the former will search for a word or phrase, the latter will also search for words or phrases below the search term in the vocabulary tree.

**Citing Clinical PMIDs:** PMIDs that cite PMIDs that have one of these as the Pub Type: "Clinical Study", "Clinical Trial", "Clinical Trial, Phase I", "Clinical Trial, Phase II", "Clinical Trial, Phase III", "Clinical Trial, Phase IV", "Adaptive Clinical Trial", "Controlled Clinical Trial", "Randomized Controlled Trial", "Clinical Trial Protocol", "Observational Study", "Guideline", "Practice Guideline"

**Condition:** Conditions are diseases, disorders, syndromes, illnesses, or injuries that are automatically extracted from titles and abstracts using natural language processing software that identifies phrases and synonyms along with their associated Medical Subject Headings (MeSH) semantic type. Can be searched as conditionPreferred or conditionBroadSynonym, the former will search for a word or phrase, the latter will also search for words or phrases below the search term in the vocabulary tree.

**Devices (Extracted):** Publication title and abstract text are compared to a dictionary of device terms and phrases. Returned matches are listed in this field. Can be searched as devicesPreferred or devicesBroadSynonym, the former will search for a word or phrase, the latter will also search for words or phrases below the search term in the vocabulary tree.

**DOI:** Search for publications by their digital object identifier.

Example Value: 10.1016/b978-0-12-801185-0.00018-0

**First Author:** Full name of first listed author on the publication.

**Full Author Affiliation:** Full address and contact details of all authors. Affiliation may be included for authors, corporate authors and investigators, if submitted by the publisher. The Abstract format displays

affiliation for citations with fewer than 100 authors. PubMed includes the note "Contributed equally" in the affiliation field if this information is supplied by publishers. Each affiliation is within square brackets, multiple affiliations are separated by a semi-colon. See also Author Affiliation.

Example value: Department of Public Health, Erasmus MC, University Medical Center Rotterdam, The Netherlands

**Full Text:** Search for words or phrases in the publication text. See also Supplemental Text.

**iCite Article Type:** Flag to show whether a publication is an article type used in iCite. To be counted as an 'article', a document must have a PubMed "Publication Type" tag indicating a possible research article, and no "Publication Type" tags indicating derivative or non-research documents. For a list of article types see [iCite Help](#)

**ISSN:** An ISSN is an 8-digit code used to identify newspapers, journals, magazines and periodicals of all kinds and on all media—print and electronic. The ISSN usually takes the form of the acronym ISSN followed by two groups of four digits, separated by a hyphen. The eighth digit is a check digit calculated according to a modulus 11 algorithm on the basis of the 7 preceding digits; this eighth control digit may be an "X" if the result of the computing is equal to "10", in order to avoid any ambiguity.

**Journal Country:** Country of journal. Field is blank for pre-prints.

**Journal Issue:** The number of the journal issue in which the article was published. Field is blank for pre-prints.

**Journal Name:** Search for publications by the journal name ISO. Field is blank for pre-prints.

Example Value: Int J Mol Sci

**Journal Name Full:** Search for publications by the full name of a journal. Field is blank for pre-prints.

Example Value: International journal of molecular sciences

**Journal Pages:** Field contains the first and last page number of the article in the journal. Field is blank for pre-prints.

**Journal Volume:** The number of the journal volume in which an article is published. Field is blank for pre-prints.

**Last Author:** Search for publications by the name of the last author on the publication.

**Latest Version:** Yes/No field to identify whether a publication is the latest version. For example, if a pre-print article has now been published in a peer reviewed journal, the field will show 'No'. To identify only the most recent versions of publications, use "Yes".

**License Type:** Identifies any licensing or copyright.

**PMCID:** The PubMed Central reference number (PMCID) is a unique number assigned to a work that is posted to PubMed Central (PMC), a free digital archive of biomedical and life sciences journal literature at the U.S. National Institutes of Health (NIH) developed and managed by NIH's National Center for Biotechnology Information (NCBI) in the National Library of Medicine (NLM). All works applicable under the NIH Public Access Policy are posted to PubMed Central.

**PMID:** PMID is the unique identifier number used in PubMed. They are assigned to each article record when it enters the PubMed system, so an in press publication will not have one unless it is issued as an electronic pre-pub. The PMID# is always found at the end of a PubMed citation.

Example Query: 25398350

**Publication Date:** Date of publication of the article of interest.

**Publication Types:** Contains the PubMed article type information.

**Publication Year:** Year of publication of article of interest.

**Published As:** Identifies publications that have also been published elsewhere, e.g. an article that was published on a pre-print server then included in a peer reviewed journal. Pre-prints now published in a peer reviewed journal will include the PubMed ID of the peer reviewed publication in this field. Peer reviewed articles previously published on a pre-print server will include the pre-print DOI in this field.

Example Value: Previously published as DOI: 10.1101/2020.02.29.20029322

**Source:** Identifies the source of the publication record. Values are either 'Peer reviewed (PubMed)' or the name of the pre-print server: arXiv, medRxiv, bioRxiv, and ChemRxiv.



**Supplemental Text:** Search for words or phrases in the supplemental text of the publication.

**System ID:** unique ID for each publication in the *iSearch* COVID-19 Portfolio. For peer reviewed publications this will be the PMID, for pre-prints this will be the DOI.

**Target (Extracted):** Targets are drug targets and are created using a dictionary of target terms and searching the text of the title and abstract. The dictionary comes from <http://www.guidetopharmacology.org/>. Can be searched as targetPreferred or targetBroadSynonym, the former will search for a word or phrase, the latter will also search for words or phrases below the search term in the vocabulary tree.

**Title:** Search for terms and phrases within the publication title.

**Total Citations:** Count of the publications citing the article.

**Total References:** The number of papers cited by the article of interest.

# Search Terms and Phrases

15th Apr 2020

Search for a topic of interest using a term or phrase.

## Search Fields

Unless fields are specified in your search, searches are only executed within the fields selected in the Searchable Fields dialog. Before conducting a search make the appropriate field selections.

## AND/OR

By default, the implied search operator in the *iSearch* COVID-19 Portfolio is AND. That means any time multiple search terms or phrases are searched without making any changes to the search operators or explicitly including a different search operator between the terms and phrases in the query; the results returned will include records where all of the search terms or phrases appear in each record. To switch the search operator applied in a search, click the appropriate radio button to the right of the search bar or type the preferred operator (OR or AND) between the search terms or phrases. If a boolean operator is part of the query, the operator in the query overrides the operator selected to the right of the search bar.

## Term

A term search refers to entering one or more independent terms in the search bar. For example, search for a single term, like:

COPD

Or search for multiple, independent terms, like:

COPD cancer

In the second example, *COPD* and *cancer* are treated as two independent terms and, without an explicit search operator between the two terms, the *iSearch* COVID-19 Portfolio returns results where *COPD* and *cancer* appear in each record. To switch the operator applied in your query select the appropriate operator to the right of the search bar. Alternatively, you can explicitly enter the preferred search operator:

COPD AND cancer

Or:

COPD OR cancer

When searching for single terms, there is no need to wrap them in quotation marks or separate them with commas.

## Phrases

A search can also be conducted with search phrases, where each search phrase is wrapped in quotation marks. For example:

"lung disease"

In the above example, records will be returned where *lung* and *disease* appear in order and adjacent to each other. Multiple search phrases can be searched together, as well, for example:

"lung disease" "lung cancer"

Again, it should be noted that the implied search operator between search phrase is AND unless explicitly switched to OR.

## Changing Search Fields and Search Operator Selections

At any point in your search, you can change Searchable Fields and search operators applied to the search. Open the Searchable Fields dialog and make field changes then click the *Search* button to rerun the search

with the updated search field. Likewise, if you choose to switch the search operator applied to your search be sure to click the *Search* button to rerun the search with the updated search operator.

# Boolean Search

13th Apr 2020

Boolean operators help define the logical relationship among multiple search terms and phrases. Boolean search logic is executed by using the operators AND, OR, or NOT between each search term or phrase. It is important to understand when to use each boolean operator and how to construct compound boolean syntax to get the most out of your search.

## AND

AND is best used to narrow search results by requiring all of the search terms or phrases in the query to occur in each record returned. For example:

COPD AND "lung disease"

The above search requires that the records returned contain both the search term and search phrase.

## OR

Conversely, OR is best used when you want to do a broad search about related topics. Each of the results returned will include one, several, or all of the search terms or phrases included in the query. Use the OR operator when it is not necessary for all terms or phrases to occur in each of the resulting records. For example:

"lung disease" OR COPD OR "lung cancer"

The above search will return records where at least one of the search terms or phrases occurs in the records returned. Not all terms or phrases have to occur in the records returned, however, results are sorted by relevance, meaning records that contain a higher number of the search terms or phrases, or have a higher quality match for the fields searched, will be returned higher in the results list. For more information see the [Relevance](#) section.

## NOT

NOT is best used when searching for a topic that often co-occurs with another topic that you wish to exclude. The NOT operator can be implemented in one of two ways, either by using the boolean operator NOT or by using the minus sign ( - ) directly in front of the term or phrase to be excluded. For example:

(COPD OR "lung disease") NOT asthma

Alternatively:

(COPD OR "lung disease") -asthma

The above search will return records containing either *COPD* or *lung disease* while excluding records containing the search term *asthma*.

## Compound Boolean Search Syntax and the Power of Parentheses

You can control the order your search terms and phrases are searched by using parentheses to group search terms and phrases. Just like in math, the terms or phrases contained inside of parentheses are considered together. Likewise, nested parentheses are considered from the inside out. For example:

("lung cancer" AND (COPD OR "lung disease")) NOT asthma

The above search will first consider the inner set of parentheses, *COPD OR lung disease*, finding records that contain both the search term and search phrase, or just one of them. Of those records, only records containing *lung cancer* will be retained. Finally, of the remaining records, any records that contain the search term *asthma* will be excluded from the results returned.

Parentheses give you a lot of control over your search syntax. When using parentheses make sure there is an opening and closing parenthesis in the appropriate places to ensure proper execution. If your results are not what you expected when using compound boolean syntax, review your query and make sure the appropriate terms or phrases are grouped together, remembering the inside out rule, and that each set of

parentheses has an opening and closing parenthesis.

A closely related query syntax technique is minimum should match. View the [Minimum Should Match](#) section for more information.

# Minimum Should Match

13th Apr 2020

Minimum Should Match is another search technique that allows you to conduct a more controlled search on related or co-occurring topics by specifying the number of search terms or phrases in the query that should occur within the records returned. The boolean operator OR returns results where at least one of the search terms or phrases appears within the records returned. Minimum should match allows you to specify the number of matched terms or phrases required to occur in a document in order to be returned in the results.

To execute a minimum should match query use the following syntax in the example below:

```
{mm=2} "lung cancer" COPD lymphoma
```

The query must begin with {mm= } where the number of terms that have to be matched in the records returned follows the equal sign ( = ), without a space between the equal sign (=) and the number of terms to match. Next, enter a series of search terms and phrases. If there are certain terms or phrases that are *required* to appear in the records returned include a plus sign ( + ) directly in front of the search term or phrase. For example:

```
{mm=2} "lung cancer" +COPD lymphoma "lung disease"
```

In the above example, *COPD* will appear in all records returned and at least 2 of the remaining search terms and phrases will appear in the records returned.

It should be noted that minimum should match overrides the selected search operator selected to the right of the search bar. Minimum should match only works with OR boolean queries. When a plus sign (+), which means required, is placed in front of a search term or phrase it is not included in the execution of the minimum should match query because minimum should match is only executed on optional terms and phrases.

Alternatively, to exclude a search term or phrase from appearing in the documents returned, include a minus sign ( - ) directly in front of the search term or phrase. For example:

```
{mm=2} "lung cancer" -COPD lymphoma "lung disease"
```

In the example above, *COPD* will be excluded for the records returned and at least 2 of the remaining search terms or phrases will appear in the records returned.

Minimum should match is most useful when querying a large number of search terms or phrases where only some of the terms are necessary to be considered relevant to the search but OR is too lenient. The results are sorted by relevance where records containing the most number of matched search terms or phrases appear at the top of the results table and as fewer terms or phrases are matched in the records returned the lower down the table the records appear.

# Wildcard Search

14th Apr 2020

Wildcard searches are useful when searching for terms that may vary in spelling or to explore a topic before narrowing your focus. A wildcard query can be formed using an asterisk (\*) for multiple character replacements or a question mark (?) for single character replacements.

## Single Character Replacement

Single character replacement is executed by using a question mark (?) in the place of an unspecified character in a search term. This type of search is most useful when the spelling of a word commonly varies or is often misspelled. For example:

NF?B

The term *NFκB* can appear in multiple variations, with the proper Greek letter kappa or an approximation of kappa, where a lower or uppercase "k" is used in place of the letter kappa. Using a single character replacement search will return records that contain the letter kappa, lowercase "k," and uppercase "K." It should be noted that while this syntactic approach is more likely to return more results about *NFκB*, it will also return records that contain other characters that occupy the same spot as the wildcard.

## Multiple Character Replacement

Multiple character replacement is executed by using an asterisk (\*) in the place where zero, one, or several characters may hold that place in a search term. To continue our example from above, multiple character placements can be used to account for several unspecified characters. For example:

NF\*B

The above example will return results where the Greek letter kappa is spelled out, e.g., *NFkappaB*, as well as *NFκB*, *NFkB*, and *NFKB*.

## Rules for using Wildcards

A multiple character wildcard replacement (\*) query allows the query to substitute any number of characters in its place, including no characters

A single character wildcard (?) query matches terms differing by one character but cannot match an empty character, hyphens, or whitespace

Wildcards can be used in single terms in the beginning, middle, or end, but not within a quoted phrase. Multiple single terms can be queried with wildcards, but wildcards do not work within the confines of quotation marks. Terms containing dashes will also not work with wildcards. Dashes are converted to spaces by the search engine and the resulting text is grouped within quotes to keep the terms together improving search experience.

When using a wildcard at the beginning of a term, it is normal to see the results return a bit more slowly. This is due to the fact the search engine has to search every term within the corpus to find all the terms that match the criteria. A search for "g\*" will take longer than a query for "ge\*" as the subset of terms that begin with "ge" is much smaller than the subset of terms beginning with "g."

Lastly, wildcards are a powerful query syntax tool, however, while wildcards return more results, it may do so at the expense of precision. Wildcards, by nature, are intended to search the corpus for every instance of your search term with terms that match the beginning, middle, and end of your term criteria, regardless of its relation to your search topic. As with all searches, regardless of the technique used, always review the results for accuracy before continuing your analysis.

# Proximity Search

13th Apr 2020

Quoted phrase searches return results where the terms within the quotation marks appear adjacent to each other in the same order they are entered. Proximity searches allow more lenient searches where the word order can be changed and the terms do not have to be adjacent to each other.

To execute a proximity search, enter a quoted phrase, followed by a tilde, followed by the number of word position changes allowed. For example:

`"lung cancer"~4`

Proximity is determined by word positions and the number of position changes allowed. Proximity is designated by the number following the tilde. Words appearing between the quoted search terms, as well as word order transposition, contribute to the position changes allotted. When you search *"lung cancer"* what you're really searching is *"lung cancer"~0*, where *lung* and *cancer* must appear in exactly that order. Searching *"lung cancer"~4* will return some of the following results:

*"cancer of the lung"*  
*"cancer in the lung"*  
*"lung and breast cancer"*  
*"lung disease and breast cancer"*  
*"cancer therapy in lungs"*

In the above example, *"cancer of the lung"* is a result returned from the search *"lung cancer"~4*. *Lung* and *cancer* swapped places where *cancer* moved left 1 position and *lung* moved right 1 position. The word order transposition used 2 of the specified 4 position changes allowed because *lung* and *cancer* each moved one time. The words *of the* appearing between the quoted search terms use the remaining 2 available position changes.

Proximity search can be used with any length of quoted phrase and the position changes allowed, specified by the number following the tilde, is boundless. However, searching for *"lung cancer"~100* is similar to conducting a search on *lung* AND *cancer* where *lung* and *cancer* will appear within the same record but the relationship between the terms will be less strict than *"lung cancer"~4* or *"lung cancer"~10*. For more strict results keep the number following the tilde low. For more flexible results increase the number following the tilde.



# Fuzzy Match

13th Apr 2020

Fuzzy match searches are best used when searching for a term that is commonly misspelled or to search for a term along with any possible typos. Fuzzy matches increase the number of records returned by allowing flexibility in the spelling of the search term to capture additional records that may be relevant to a search term.

To form a fuzzy match query enter the search term, followed by a tilde, followed by the number of edits allowed. For example:

arrhythmia~1

Edits are changes to the original term in the form of added letters, deleted letters, substituted letters, or transposition of letters. In the above example, arrhythmia~1 will return the following results:

## Example Query: arrhythmia~1

Example Results	Edit Types	Explanation
arrythmia	deletion	<i>Arrythmia</i> is missing the first 'h'
arrhythmic	substitution	<i>Arrhythmic</i> changed the ending 'a' to 'c'
arrhythmiae	addition	<i>Arrhythmiae</i> added an 'e' to the end
arryhthmia	transposition	<i>Arryhthmia</i> swapped 'y' and 'h'

Edit distance, specified by the number following the tilde, can be the whole numbers 0, 1, or 2. Unlike proximity searches, which doesn't have a specified maximum number of allowed position changes, fuzzy matches have a maximum edit distance of 2.

Results returned after a fuzzy match search is executed are sorted by relevance where records containing the most number of characters from the search term in the same order appear at the top of the results table.

# Searching Numerical Fields

15th Apr 2020

It is possible to search number fields in the *iSearch* COVID-19 Portfolio, either for exact values (As you would search a phrase) or to search for a range of values. e.g. awarded dollars above an amount, publication years between two dates.

To search multiple years, place the minimum and maximum within square brackets and use 'TO'. e.g.:

pubYear:[2019 TO 2020]

To search an open ended range e.g. everthing from 2019 onwards use an asterisk as a wild card. e.g.

pubYear:[2019 TO \*]

The correct format for date fields containing day and month as well as year is:

pubDate:[2020-01-01 TO 2020-01-31]

# Options Menu

22nd Apr 2020

□

The *iSearch* COVID-19 Portfolio Application Options button, represented as a menu button with three stacked horizontal lines, is located in the top right corner of the screen and contains general actions available in the application.

# User Guide

15th Apr 2020

The User Guide button contains the *iSearch* COVID-19 Portfolio application documentation. The documentation provides explanations and instructions on how to use the application.

To navigate the User Guide, refer to the table of contents on the left side of the guide.

To search for a topic enter your query in the search bar located at the top of the table of contents section on the left side of the screen then press Enter. A list of results will be displayed in the main viewing area of the User Guide along with a brief snapshot of the content on each page returned in the results. Click on the page heading to open the page and learn more about your search topic. Click the “x” to the left of the search bar to clear your search and the in-page highlighting.

# Submit Feedback

15th Apr 2020

To ask a question, make a suggestion, or report an issue click the *Submit Feedback* button. This will open up an email to the *iSearch* COVID-19 Portfolio team. Before sending, provide enough detail for us to understand your issue or request. The email address for the OPA *iSearch* COVID-19 Portfolio team is:

[OPA\\_COVID19@od.nih.gov](mailto:OPA_COVID19@od.nih.gov).

# Tab Views

22nd Apr 2020

Depending on the activity being performed in the application the view changes from Table View, to Facet View, to Record View. Learn more about the features available in each view by reading the following sections.

# Breadcrumbs

16th Apr 2020

□

Each time a facet is selected or excluded and the search is rerun a breadcrumb with the name of the facet is displayed as a breadcrumb along the top of Table and Facet views. Facets that are included in the search appear green while facets that are excluded appear red.

□

To remove a facet from the search click the Remove Facet “x” to the right of the facet name in the breadcrumb, and the search will update automatically. To remove multiple facets from the search at one time open the Facet View tab, turn on the Multi toggle, and click on the facets to deselect and remove from the search, then click Search to rerun the search and update the results. Alternatively, open the Modify Facets dialog in the facet panel you wish to edit and click the Reset Facets button in the top of the Modify Facets dialog.

If more than 15 facets are selected, the breadcrumbs will be collapsed into a clickable breadcrumb header. Click the breadcrumb header to display or hide all breadcrumbs.

Collapsed: □

Expanded: □

## Edit Breadcrumbs

To edit a breadcrumb for a facet or advanced filter, click on the Modify button, depicted as a pencil to the right of the facet or advanced filter name. The corresponding facet panel or advanced filter dialog will open and you can directly make and apply changes without leaving your current location. Your search will be rerun to update your results and any changes to facets or advanced filters will be displayed in the breadcrumbs. □

# Table View

13th Apr 2020

□

The Table View tab, depicted as table grid near the top left side of the screen, displays the record results from a completed search. At the top of the table is the Results count which displays the number of records returned.

The far left column of the table is the hyperlinked record ID that can be clicked to open and view a record.



# Column Display

13th Apr 2020

□

You can select which columns are displayed in the table by clicking the menu button on the top right corner of the table. A screen will appear with check marks next to the columns displayed. Click on the check boxes next to column names to deselect and hide them from view. The check mark will be removed when the column is not displayed. Click the column name again, and the check mark will appear beside the column name, and the column will be displayed.

□

# Expand Table View

16th Apr 2020

□

The number of rows displayed in the table can be expanded by clicking the Maximize button, represented as four-arrows stretching out in all directions in the top right corner of the table.

□

To exit expanded table view click the Minimize button, represented as two arrows pointing toward each other in the top right corner of the table.

# Include and Exclude Results

16th Apr 2020

□

Results can be refined directly in Table View by using the checkboxes in the leftmost column of the table and selecting either the Include or Exclude buttons in the top left corner of the table.

## **Include Selected Results in Updated Search**

To rerun a search based on select results in the table, click the checkbox next to the record(s) to be used in a new query, then click the plus button in the top right corner of the table. The search will be rerun with the selected records as it's query and the updated results will appear in the table.

## **Excluded Selected Results in Updated Search**

To exclude results from your data set select the checkbox to the left of the records then click the minus button in the top right corner of the table. The search will be rerun excluding the selected records and the updated results will appear in the table.

□

A breadcrumb will appear above the table displaying the number of records that were either included or excluded from the search. To return to a previous data set click the “x” on the right side of the breadcrumb to remove the search criteria and return to a previous data set.

# Quick Links to PDFs

16th Apr 2020

□

Quick links to PDFs are listed beside the system ID in the left-hand column of the table. Click on the PDF button to view the document in a new browser tab or window.

# Column Sorting

13th Apr 2020

□

(Results are sorted by Publication Date where Publication Date refers to the data the record was added to PubMed or last updated on the preprint server.)

To sort a column of data in ascending or descending order, move the cursor over the header of the column, if a column is sortable the cursor will change from a pointer to a hand.

For text fields, click the header once to arrange the data in ascending order, click again to sort it and descending order. Numeric fields sort descending first. Once an order is specified on a column it will remain applied in each subsequent search until the module is exited.

□

# Export

13th Apr 2020

□

Export options are available by clicking the Export button, depicted as a downward facing arrow. A dropdown menu of available export options will appear when clicked. View the [Export](#) page to learn more about export options.

The Export button is available in Table View and Facet View.

# Open Multiple Records from Table Tab

12th Apr 2020

To open multiple records at a time press Ctrl button (or the Apple button on Macs) while clicking on the hyperlinked record ID and each record clicked will open in a new browser tab or window.

# Facet View

16th Apr 2020

□

To access Facet View click on the *Facet View* tab, depicted as a downward arrow to the right of the Table View tab, in the top left corner of the page. Facets allow you to focus your search results to examine specific aspects of your data.

To apply a facet to your search, click on the facet and the search will be automatically updated.



# Select Facets

13th Apr 2020

□

By default, all facet panels are displayed in the Facet View tab. To select which facet panels are displayed click on *Select Facets*. Click on the facet panel names to select the panels you want to be displayed. A checkmark will appear next to the facet panels selected for display, and the remaining facet panels will be hidden from view. Use the *Select All//Deselect All* buttons at the top of the dropdown menu to make selection easier.

The panels selected for display will remain on display until you open *Select Facets* and make changes, click the *Reset Search* button, or close the application.

# Multi Toggle

16th Apr 2020

□

To apply multiple facets to your search at one time without triggering a refresh on the search each time a facet is selected, turn the Multi toggle on by clicking *Multi* until the green *On* label appears. Select multiple facets from multiple facet panels then click the *Search* button to rerun your search with the updated criteria. Your results will not be updated unless *Search* is clicked or the Multi toggle is turned off. To turn off Multi click on Multi again until the red *Off* label appears.

## Ctrl Click Multi Selection

13th Apr 2020

Another method to select multiple facets from multiple facet panels at one time is to press and hold the Ctrl key (or Apple key on Macs) while clicking on facets. After selecting several facets, release the Ctrl or Apple key, and the search will be updated with the new search criteria.

A caveat to this method is that for some browsers holding the Ctrl key while scrolling is also a shortcut for zooming. If holding the Ctrl key while scrolling is affecting the zoom on your page use the Multi toggle button to select multiple facets.

# Exclude Toggle

16th Apr 2020

□

Facets can be excluded from the search by turning the Exclude toggle on, located to the right of the Multi toggle. Exclude will remove records from the results containing the selected facet value when the search is rerun. To select multiple facets at a time to exclude, turn the *Multi* toggle *On*. If you are using the Multi toggle with the Exclude toggle be sure to click the *Search* button to rerun the search after making all of your selections.

# Modify Facets

16th Apr 2020

□

To search for a facet or quickly select multiple facets within a facet panel to include or exclude from your search click on the *Modify Facets* button, represented as a menu button with three stacked horizontal lines. A Modify Facets dialog opens with three sections, on the left is a list of all facets available in the facet panel in alpha-numeric order and on the right are two sections, Selected Facets and Excluded Facets.

□

Use the search bar above the list of facets to quickly search for a facet. To move a facet from the list to one of the other sections (Selected or Excluded), click and drag the facet to the appropriate section.

□

Above the Selected and Excluded Facets sections are the search operator buttons AND and OR. By default OR is selected. The AND/OR search operator works the same way inside Modify Facets as it does in the rest of the *iSearch* COVID-19 Portfolio. If AND is selected in the Selected Facets section then all facets selected must occur in the records returned. If AND is selected in the Excluded Facets section, then records are excluded if they contain all of the selected facets. If OR is selected in the Selected Facets section, then a record is returned if any of the facets selected occur. If OR is selected in the Excluded Facets section, then a record is excluded if any of the facets selected are occur in the record.

□

To remove all applied facets within a specific facet panel, open the Modify Facet dialog by clicking on the three horizontal bars in the top right corner of the facet panel. Then click the Reset Facets button followed by the Apply Changes button. All facets within the facet panel will be cleared and removed from the search and an updated search will be run.

After making your facet selections click the *Apply Changes* button in the bottom right corner of the dialog to execute an updated search with the added facets.

# Record View

16th Apr 2020

□

Record View appears when the hyperlinked ID for a record is clicked in the far left column of the table. A dialog appears in the center of the screen displaying the contents of one record. Along the top of the dialog is a series of buttons and beneath the buttons are tabs. Review the Record View section to learn more about the features and content included in record view. After viewing a record, click the *Close* button in the bottom right corner of the dialog to return to Table View.

# Current Record

16th Apr 2020

Below the buttons that are placed along the top of each record are two tabs: Current Record and Associated Docs. The Current Record tab displays the content for the currently opened record. Fields are displayed in groups that match the field groupings displayed in the Searchable Fields and Export dialogs. The blue heading with white text displaying the name for each group is clickable. Click a group header to collapse the group. To expand a collapsed group click on the blue header again and the group will expand to display all fields. Fields that have no data displayed have no associated data available.

Collapsed Groups - Click on the blue header and the group will expand. Click again and the group will collapse.

□

The fields within a record vary from single-valued fields to multi-valued fields, to structured fields. Multi-valued fields are fields that contain several values in a list format. Structured fields are fields that contain a table that breaks structured data into columns and rows to keep associated data properly aligned.

Multi-Valued Field Example:

□

Structured Fields Example:

□

# Similar Records

16th Apr 2020

□

To find records that are similar to the currently opened record click the *Find Similar Records* button in the top left corner of record view. A new browser tab will open displaying up to the results with full functionality available to export, visualize, refine with include/exclude functionality, and more.

To return the most similar records to the currently opened record an algorithm is used. The algorithm reviews the publication title and abstract, to find keywords in each field that are relevant to the current record. An internal search is then conducted using those keywords to identify other records containing at least 40% of those keywords by default. Lastly, the records compiled from the internal search are analyzed for relevance using Lucene BM25 algorithm. The records that are most similar are then displayed in the Similar Records table, which opens in a new browser tab. □

## Modify Similar Records Results

□

To modify the amount of similarity between the current record and those found in Similar Records, click the Modify button, depicted as a pencil on the similar records breadcrumb. Use the sliding scale to select the degree of similarity between 0.1 and 0.8, then click apply changes. At 0.1 (which equates to 10% of the identified keywords in the current record) the results will be very broad and at 0.8 (which equates to 80% of the identified keywords in the current record) the results will be near duplicate.



## Associated Docs

13th Apr 2020

□

The Associated Docs tab contains the PDF version of the paper for viewing either in the document display window of the tab or click the Open in New Window button at the top of page to view the PDF in a new browser tab or window.

# PermaLink

16th Apr 2020

□

The *Permalink* button appears at the top of record view depicted as a chain link in the far left corner of the screen. Permalink opens the record in a new browser tab or window with a static link in the browser's URL bar at the top of the page. The static link can be copied and used to share or bookmark a record.

# Print

16th Apr 2020

□

To print a record, click the *Print* button in the top left corner of the screen. The record will open in a new browser tab or window. Use the browser's print button to print the record. Be sure to expand any fields that appear collapsed (fields containing a "... " or "Show More" button) before printing the record to ensure all content is displayed and printed.

# Go To Source

16th Apr 2020

□

Click the *Go to Source* button in the top left corner of Record View, depicted as an arrow, to view the source of the current record.

# Select Fields

16th Apr 2020

□

The last button in the top left corner of Record View is Select Fields. To manage the fields displayed in a record click on *Select Fields* to open a Displayable Fields dialog. In the Displayable Fields dialog select fields to display by clicking the checkbox to the left of a field name. To select or deselect multiple fields quickly and easily, use the *Select All/Deselect All* buttons in the top left corner of the dialog or click the checkbox next to the name of a group to select or deselect all fields within a group. Use the *Reset* button to the right of *Select All/Deselect All* buttons to remove your selections. Click *Accept* in the bottom right corner of the dialog to apply your field selections.

Please note that field selection options are applied to the record currently opened. Once the record is closed, and a new record is opened the previously selected displayable field choices will not be applied to the newly opened record.

□

# System ID

16th Apr 2020

The System ID for each record is displayed in record view. System IDs are unique IDs within the *iSearch* COVID-19 Portfolio application and assigned to each record.

□

# Export

11th Jun 2020

□

The Export button allows you to export your results or visualize your result set. Read the following sections to learn more about each functionality.

# Export Results

2nd Oct 2020

□

To export your results to an Excel or CSV file click the *Export* button. The Export Results dialog will open where you can provide a title for your file. If no title is provided for the file, an auto-generated title is created that includes the application name, data, and time of the export. Next, select your preferred file type by selecting the radio button to the left of CSV or Excel. If you want to [Unwind](#) a multi-valued field, click on the *Field(s) to unwind* button to open the dropdown menu and select the field(s) to unwind. Next, select the fields of data that should be included in the export file by selecting the checkbox to the left of the field name. For convenience, select the checkbox next to the group heading if you want to download all fields in that group. Conversely, deselect the checkbox next to the group heading if you want to exclude all fields in that group. To look for a specific field, use the Lookup Fields search bar located to the top left of the search fields groups, begin typing the name of the field, then select the checkbox to the left of the field. Use the *Clear "x"* button to the left of the Lookup Fields search bar to clear the field search. You can also use the *Select All/Deselect All* buttons for quick field selection. To reset your field selections to the default settings, click *Reset*.

After providing a title for the export and selecting all fields to be included in the export, click the *Export* button. The file will automatically download.

If the System ID field is selected for inclusion in the export, the System ID will be hyperlinked back to the record in the application. Click the System ID hyperlink in the spreadsheet and the record will open in the *iSearch COVID-19 Portfolio* application where the full record can be viewed.

## RIS

□

Select RIS in the export options then select the fields to be included in the export and select *Export*. A notification will appear when the file is ready. The file is then ready to upload into your preferred citation manager application.

The unwind functionality is not available when RIS is selected as the export option.

## Link to Source

□

If the Include Link to Source checkbox is selected for inclusion in the export, a Source column will be included in the export file with hyperlinked sources for all applicable records. The Link to Source checkbox must be selected for inclusion as it is not included automatically unless selected.

## Include Visualization Categories

□

For results containing 5000 records or less, the option to Include Visualization Categories as a column in your file is available for selection. If selected, a column will be included in the exported file containing information about the visualization categories for each record. See [Visualization](#) for more information about visualization categories.



# Unwind

5th Jun 2020

□

## What is Unwind

Unwind is a powerful feature that allows you to separate multi-valued fields that usually appear as semi-colon separated values in an exported file as individual rows for a more discrete analysis in an Excel or CSV file, especially when exported with other fields of interest. Continue reading to learn more about unwind.

## How Unwind works

When a multi-valued field is unwound, each value appears in a separate row. When the multi-valued field is unwound along with single-valued fields, those single-valued fields will repeat for each of the values associated with the multi-valued field.

## How to Unwind

The Unwind feature is available via the *Export* button. Enter a title for the file, then select the multi-valued field(s) to unwind from the *Field(s) to unwind* dropdown menu. Next, select CSV or Excel as your file type. Finally, select the field(s) to be included in the unwind. After making your selections click *Export*. When the export is complete, the file will appear at the bottom of your screen to be opened.

## Unwinding Several multi-valued fields

More than one multi-valued field can be unwound. Like the example above, each value in a multi-valued field appears in a separate row and single values associated with the multi-valued field repeat.

## Unwinding Structure Fields

Structured fields are fields that appear in table format within record view, for example the Authors field in Record View. When unwinding a structured field, select the structured field from the Unwind dropdown menu, then select the sub-fields of interest from the field selection groups along with any additional single-valued field(s). Some sub-fields are multi-valued themselves.

## Best Practices

When using the Unwind feature, it is best to keep additional fields limited as unwinding creates large export files. The purpose of Unwind is to allow you to explore multi-valued fields in isolation as they relate to other fields of interest. Keep exports using Unwind focused to just the fields of interest. For this reason, you will notice that some fields are disabled and not selectable to be included in an Unwind export, such as Abstract, because the field tend to be long and can create large exports that take a long time to export and open.

# Export to iCite

5th Jun 2020

*iCite* is a tool with three modules: Influence, Translation, and Open Citations.

*iCite*: Influence delivers metrics of scientific influence such as the Relative Citation Ratio (RCR), which is field- and time-adjusted, and benchmarked to NIH publications as the baseline. Read about how RCR is calculated at [PLOS Biology](#).

*iCite*: Translation measures how Human, Animal, or Molecular/Cellular Biology-oriented each paper is, and uses this information to track and predict citation by clinical articles. Read about how the Approximate Potential to Translate (APT), a machine learning-based estimate of the likelihood that a paper will be cited in later clinical trials/guidelines is calculated at [PLOS Biology](#).

*iCite*: Open Citations disseminates link-level, public-domain citation data from the NIH Open Citation Collection (NIH-OCC). Read about the NIH-OCC at [PLOS Biology](#).

PMIDs from your *iSearch* COVID-19 Portfolio results are used to conduct a search and return results in *iCite* within a new browser tab or window. If transferring from *iSearch* - Grants, the PMIDs are those linked to the core grants in your result set. As publications are linked to core grants and not individual ApplIDs you may find publication dates prior to any time filter you apply in the Grants module.

# Visualize Results

2nd Oct 2020

To view a topical breakdown of your search results, open the *Exports* dropdown menu and select *Visualize Results*. For result sets containing 5000 records or less a FoamTree visualization can be created with labeled clusters representing the topics within the record set. A dialog will appear displaying the application's default field selections used to populate the visualization. To customize the fields used for visualization select and deselect field preferences then click *Submit* in the bottom right corner of the dialog.

□

## Method

Visualize Results uses a clustering algorithm (lingo3g) which takes words and phrases from the Chemicals & Drugs, Targets, and MeSH fields. The clusters displayed are scaled to the number of publications. Words are clustered based on how often they occur together in the same document. Before clustering, documents are preprocessed using stemming, stop words, and synonym normalization.

## Navigating

The FoamTree visualization will appear in a panel on the left, while an empty table will appear in a panel on the right.

□

To view the records that comprise a cluster single left click on a cluster and the panel on the right will be populated with the records contained within the cluster. To zoom in on a cluster to view the cells within it, double left click.

□

To view the records within an individual cell of a cluster, single left click on the cell and the records will appear in the right-side panel.

To zoom out of a cell or cluster, double right click.

To select multiple clusters or cells of interest, hold down the Ctrl (or Apple) key while clicking on the clusters and cells of interest to select them. The records that comprise the selected clusters or cells will appear in the table on the right-side of the page.

□

To select or deselect all clusters, or all cells within a zoomed in cluster, use the *Select All* and *Deselect All* buttons located over the visualization above the left-side panel.

□

## Table View

To view a record from the results table in the right side panel, click on the hyperlinked record ID in the far left column of the table.

□

To expand the table and view more rows of records click the *Maximize* button in the top right corner of the table. To minimize and return to the normal table view, click the *Minimize* button in the top right corner of the table.

## Searching Results from a cluster

□

To search the records within the results table, click the *Search* button in the top right corner of the table and a search will be executed within the *iSearch* COVID-19 Portfolio application in a new browser tab or window.

## Export Cluster Documents

□

To download the records in the results table, click the Export Cluster Documents button in the top right corner of the results table. A record can occur in multiple categories. In Export, records will show all of their categories, include the parent and child categories.

## Download the Visualization

□

To download the visualization click the *Download* button, represented by a downward pointing arrow in the top left corner of the screen.

## Return to Search

□

To exit visualize results and return to your search, click the *Go Back* button in the top left corner of the screen.

# FAQs

12th Apr 2021

## ***iSearch* COVID-19 Portfolio Frequently Asked Questions**

- [1. What is \*iSearch\*?](#)
- [2. How do I cite the \*iSearch\* COVID-19 Portfolio?](#)
- [3. Which browsers are supported?](#)
- [4. Can I save my search and/or results?](#)
- [5. How can I get in touch if I have questions?](#)

### **1. What is *iSearch*?**

*iSearch* is NIH's next-generation portfolio analysis platform, providing comprehensive, easy-to-use access to a carefully curated, extensively linked data set of global grants, patents, publications, clinical trials, and drugs.

In response to analytical needs in connection with the SARS-CoV-2 pandemic, OPA has developed a special module of *iSearch* to provide a comprehensive, expert-curated portfolio of COVID-19 publications and preprints. Our *iSearch* COVID-19 portfolio, which includes peer-reviewed articles from PubMed and preprints from medRxiv, bioRxiv, ChemRxiv, and arXiv, is updated daily with the latest available data. This resource enables users within and outside NIH to explore and analyze the rapidly growing set of advances in COVID-19 research as they accumulate in real time, and complements efforts by NLM to aggregate full text documents broadly related to COVID-19 and other outbreaks, and articles on COVID-19 specific to the PubMed database.

[Back to Top](#)

### **2. How do I cite the *iSearch* COVID-19 Portfolio?**

No permission is required to use public government information. Cite NIH OPA *iSearch* COVID-19 Portfolio.

[Back to Top](#)

### **3. Which browsers are supported?**

We support most browsers, though some functionality will not work in Internet Explorer. We recommend Google Chrome.

[Back to Top](#)

### **4. Can I save my search and/or results?**

After running a search, the url at the top of the screen will be unique to that search. Saving the url will enable you to re-run the search or to send it to someone else so that they can view your search results. Note that this url is for the search, not the results. If new publications, matching your search criteria, have been added to the portfolio since you last ran the search these would be included in your search results.

To save a static copy of your results you can [Export Results](#) to an Excel or .csv file.

[Back to Top](#)

### **5. How can I get in touch if I have questions?**

You can use the submit feedback button in the menu at the top right of the screen, or you can email the OPA *iSearch* COVID-19 Portfolio team at: [OPA\\_COVID19@od.nih.gov](mailto:OPA_COVID19@od.nih.gov).

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/ **Search-syntax**

# **Search-syntax**

1st Jan 1970

# Search Terms and Phrases

13th Apr 2020

Search for a topic of interest using a term or phrase.

## Search Fields

Unless fields are specified in your search, searches are only executed within the fields selected in the Searchable Fields dialog. Before conducting a search make the appropriate field selections.

## AND/OR

By default, the implied search operator in the Covid-19 Portfolio is AND. That means any time multiple search terms or phrases are searched without making any changes to the search operators or explicitly including a different search operator between the terms and phrases in the query; the results returned will include records where all of the search terms or phrases appear in each record. To switch the search operator applied in a search, click the appropriate radio button to the right of the search bar or type the preferred operator (OR or AND) between the search terms or phrases. If a boolean operator is part of the query, the operator in the query overrides the operator selected to the right of the search bar.

## Term

A term search refers to entering one or more independent terms in the search bar. For example, search for a single term, like:

COPD

Or search for multiple, independent terms, like:

COPD cancer

In the second example, *COPD* and *cancer* are treated as two independent terms and, without an explicit search operator between the two terms, the Covid-19 Portfolio returns results where *COPD* and *cancer* appear in each record. To switch the operator applied in your query select the appropriate operator to the right of the search bar. Alternatively, you can explicitly enter the preferred search operator:

COPD AND cancer

Or:

COPD OR cancer

When searching for single terms, there is no need to wrap them in quotation marks or separate them with commas.

## Phrases

A search can also be conducted with search phrases, where each search phrase is wrapped in quotation marks. For example:

"lung disease"

In the above example, records will be returned where *lung* and *disease* appear in order and adjacent to each other. Multiple search phrases can be searched together, as well, for example:

"lung disease" "lung cancer"

Again, it should be noted that the implied search operator between search phrase is AND unless explicitly switched to OR.

## Changing Search Fields and Search Operator Selections

At any point in your search, you can change Searchable Fields and search operators applied to the search. Open the Searchable Fields dialog and make field changes then click the *Search* button to rerun the search



with the updated search field. Likewise, if you choose to switch the search operator applied to your search be sure to click the *Search* button to rerun the search with the updated search operator.